



Understanding the “Contact or Case Patient” Field

The **Contact or Case Patient** field locks the first time a monitoring event (ME) is saved, and it documents whether this ME was *entered* into the system as describing a contact or a case patient. This field will always remain locked on either “Contact” (even for contacts who test positive during their monitoring period) or “Case” (for cases who are entered manually into CCTO or who flow in from NC COVID) for this ME. **All of this is correct, and no further action on this field is required.** If you are required to continue monitoring on a contact who tests positive, you will close out the “Contact” ME and use a new “Case” ME to record their isolation monitoring. **Read on for details.**

Record Information

Contact or Case Patient * Contact

Documenting Monitored Contacts Who Test Positive

When an existing contact tests positive for COVID-19, complete the following actions:

1. Complete all fields under the contact monitoring event (ME) **Testing Details** section.
2. Defer to your local guidance on any other actions required before closing this ME. When you close this ME, select the FMO of **“Contact Tested Positive During Monitoring.”** Close and deactivate this ME [per the job aid](#).

1 Testing Details

Referred to Test? Yes

Referred to Test Date 10/26/2021

Tested? Yes

Test Date 10/27/2021

COVID-19 Test Result Positive

Add Additional Test?

Complete Testing Details

2 Final Monitoring Outcome

Contact Tested Positive During Monitoring

Close as “Contact Tested Positive During Monitoring”

CONTINUED MONITORING:

If your local guidance requires that this person continue monitoring in CCTO after their contact ME has been closed and deactivated, **they should continue to be monitored within a new ME labeled as a case.** See the following pages for guidance on:

- **Option 1:** Continuing monitoring via a new case ME that has flowed from NC COVID.
- **Option 2:** Continuing monitoring on a new ME labeled as a case that was created from their person record (if an NC COVID record is not available).

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Option 1: Continue Monitoring on a Flowed Monitoring Event

- Most cases entered into NC COVID will flow automatically into CCTO to be sent automatic digital notification ([see job aid](#)), including case patients who were already being monitored as contacts in CCTO per the last section. Currently, there is no state-level requirement to review, monitor, or close out these cases in CCTO. There is also no requirement to enter cases manually.
- **If your local protocol requires monitoring within CCTO on a contact who tests positive and becomes a case, you should do this on a new monitoring event (ME) labeled "Case." Ideally, this will be the ME that has flowed from NC COVID.** See the process below.

If an individual who is currently being monitored in CCTO has tested positive for COVID-19, they will be entered into NC COVID as a case patient. This NC COVID record will then flow into CCTO and be **notified automatically if key requirements are met**. This creates a new CCTO monitoring event (ME) labeled as a case on which you can continue monitoring if required:

1. When an NC COVID case patient record arrives in CCTO under this individual's name, there may be a duplicate warning* on the individual's existing contact ME. **Ensure this contact ME is updated and closed as "Contact Tested Positive During Monitoring" per the previous section.**
2. Locate the individual's new case ME that has flowed from NC COVID and **reassign it if needed**. (You may wish to search the "All Case MEs Imported from NC COVID" view. If the ME is not yet available, check again in 12-24 hours or see Option 2 on the next page.)
3. **Review the Person field within the case ME.** If this ME is not assigned to the correct person record, update this field to the person record associated with the contact ME you have just closed.
4. Transfer over any missing information, and continue monitoring on the case ME as normal.

1

Read-only. This record's status is inactive.

PF Princess Frog - Saved
Monitoring Event - MDA Form

Monitoring Event Assessments All Activities Referrals System Information

Record Information

C# C-0000999790

Contact or Case Patient Contact

Person Princess Frog

Basic Info

Begin Monitoring? No

Monitoring Status Monitoring Ended

Monitoring End Date 11/14/2021

Final Monitoring Outcome Contact Tested Positive During Monitoring

Symptom Onset Date

Update and close the contact ME

*This duplicate warning is caused by inefficiencies with the system and unfortunately cannot be resolved.

2

PF Princess Frog - Saved
Monitoring Event - MDA Form

Monitoring Event Assessments All Activities

Record Information

C# C-0001002452

Contact or Case Patient Case

Begin Monitoring?

Monitoring Status

Locate case ME that flowed from NC COVID

3

PF Princess Frog - Saved
Monitoring Event - MDA Form

Monitoring Event Assessments All Activities Referrals System Information

Record Information

C# C-0001002452

Contact or Case Patient Case

Person Bernard Test11052021 Max

Update Person if needed and continue monitoring

4

PF Princess Frog - Unsaved
Monitoring Event - MDA Form

Monitoring Event Assessments All Activities Referrals System Information

Record Information

C# C-0001002452

Contact or Case Patient Case

Person Princess Frog

Update Person if needed and continue monitoring

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Option 2: Continue Monitoring on a New ME

If directed by your local protocol, you can also continue monitoring a contact who has tested positive by deactivating their contact monitoring event (ME) and using the associated person record to create a new ME labeled "Case."

This method does not require the use of an NC COVID ME and may be done to ensure that documented outreach to the case is not delayed.

1. Ensure the ME of the contact who has tested positive has been **updated, closed** as "Contact Tested Positive During Monitoring," and deactivated per the previous section.
2. Visit this individual's person record (via the Person field on their ME). Within their Monitoring Events page, confirm that they do not already have an active ME.
3. Click **+New Monitoring Event** on the right of the page. A new ME will appear with the individual's basic information from their contact ME pre-populated.
4. In the new ME, toggle the "Contact or Case Patient" field in the **Record Information** section to "**Case.**" Be sure to select the correct value as this field will lock upon saving and cannot be changed.
5. If it is available, enter the Event ID of the case in the **NC COVID Event ID** field. This field only displays the Event ID of the individual to whom this ME belongs, *not* of the source patient. (*In situations when a contact is being entered instead of a case patient, this field is not shown.*)

1

Read-only This record's status: Inactive

Lemon Jello - Saved
Monitoring Event · MDA Form

Monitoring Event Assessments All A

Record Information

C#	C-0001002460
Contact or Case Patient	Contact
Person	Lemon Jello

Final Monitoring Outcome Contact Tested Positive Du

Update and close the contact ME

2

Lemon Jello - Saved
Person · Admin Form

General Monitoring Events System

Active MEs

✓ C# | Approved to Sy... | Full Name | Last Name

No data available.

Visit person record and confirm no active MEs

3

Basic Info

Priority Contact or Case No

First Name * Lemon

Middle Name Blumpee

Last Name * Jello

Preferred Name ---

Date of Birth (DOB) 1/1/2013

4

Record Information

C#

Contact or Case Patient * Case

Person Lemon Jello

Select "Case" on the new ME

5

NC COVID Case Patient Info

NC-COVID Event ID * 122333444

Enter the Case Patient NC COVID Event ID if available

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Option 2: Continue Monitoring on a New ME

6. Within **NC COVID Diagnosis Date**, enter the case's diagnosis date (date of the case's positive lab), which should be confirmed in NC COVID if available. This will lock immediately upon entry.
7. Save your work and proceed with monitoring as normal.

The screenshot displays two parts of the CCTO interface. The top part, labeled with a red circle '6', shows the 'NC COVID Case Patient Info' form. It includes fields for 'NC-COVID Event ID' (122333444) and 'NC COVID Diagnosis Date' (11/4/2021). A red box highlights the 'NC COVID Diagnosis Date' field, and a red callout box to the right says 'Enter Diagnosis Date'. The bottom part, labeled with a red circle '7', shows the 'Lemon Jello' monitoring event page. The 'Save' button in the top navigation bar is highlighted with a red box, and a red callout box to the right says 'Save and Monitor as Usual'. Below the navigation bar, the 'Record Information' section shows 'C#' (C-0001002491), 'Contact or Case Patient' (Case), and 'Person' (Lemon Jello).

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Only if required: Manual Case Patient Entry

Manual entry and monitoring of cases into CCTO is **not required**; however, if it is recommended by your local guidance, you may enter a new case patient who is not a current contact into CCTO:

1. Generally, you can use the [CCTO Glossary](#) and the guidance outlined in the [Entering a Contract micro-training](#) to help you complete as much information as possible; however, you should pay careful attention to the extra steps below. *You will not fill in the "NC COVID Source Patient Event ID" or "Last Date of Exposure" fields.*
2. Toggle the "Contact or Case Patient" field in the **Record Information** section to "**Case.**" *Be sure to select the correct value, as this field will lock upon saving and cannot be changed.*
3. Enter the case's **Date of Birth**. This is a required field for all case patients and helps them utilize the portal for notified cases.
4. Enter the **Event ID** of the case in the "NC COVID Event ID" field. This field only displays the Event ID of the individual to whom this ME belongs, *not* of the source patient. *(If a contact is being entered instead of a case patient, this field is not shown.)*
5. Finally, within **NC COVID Diagnosis Date**, enter the case's diagnosis date (date of the case's positive lab), which should be confirmed in NC COVID if available. This will lock immediately upon entry.

1. **Create a new ME**

2. **Select "Case"**

3. **Enter the Case Patient DOB**

4. **Enter the Case Patient NC COVID Event ID and NC COVID Diagnosis Date**

5. **Enter the Case Patient NC COVID Event ID and NC COVID Diagnosis Date**